How do I Reduce the Encumbrance on a PO Line?

When a it becomes necessary to reduce the encumbrance on a purchase order.

Reducing Encumbrance

Correct Line information

1. Use the following instruction to navigate to purchase panels to reduce the encumbered amount.

2. Making changes to the line information to successfully relieve the encumbrance.

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Step 1: Reducing the Encumbered Amount

If may become necessary to reduce the encumbrance on **Type 2** purchase order lines. On all of our purchase orders the steps will need to be followed exactly to create the additional accounting lines that will reflect the change in IRIS>

⇒ Go

⇒ Administer Procurement

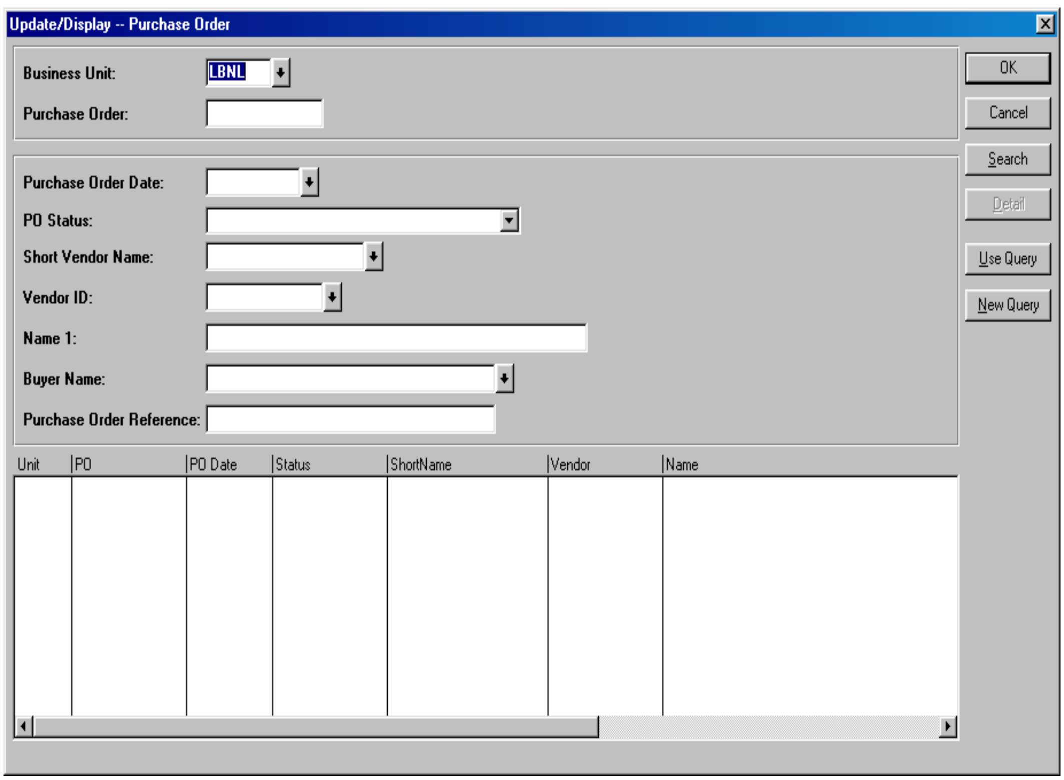
⇒ Manage Purchase Orders

⇒ Use

⇒ Purchase Order

⇒ Lines

The Update/Display Purchase Order dialog box displays.



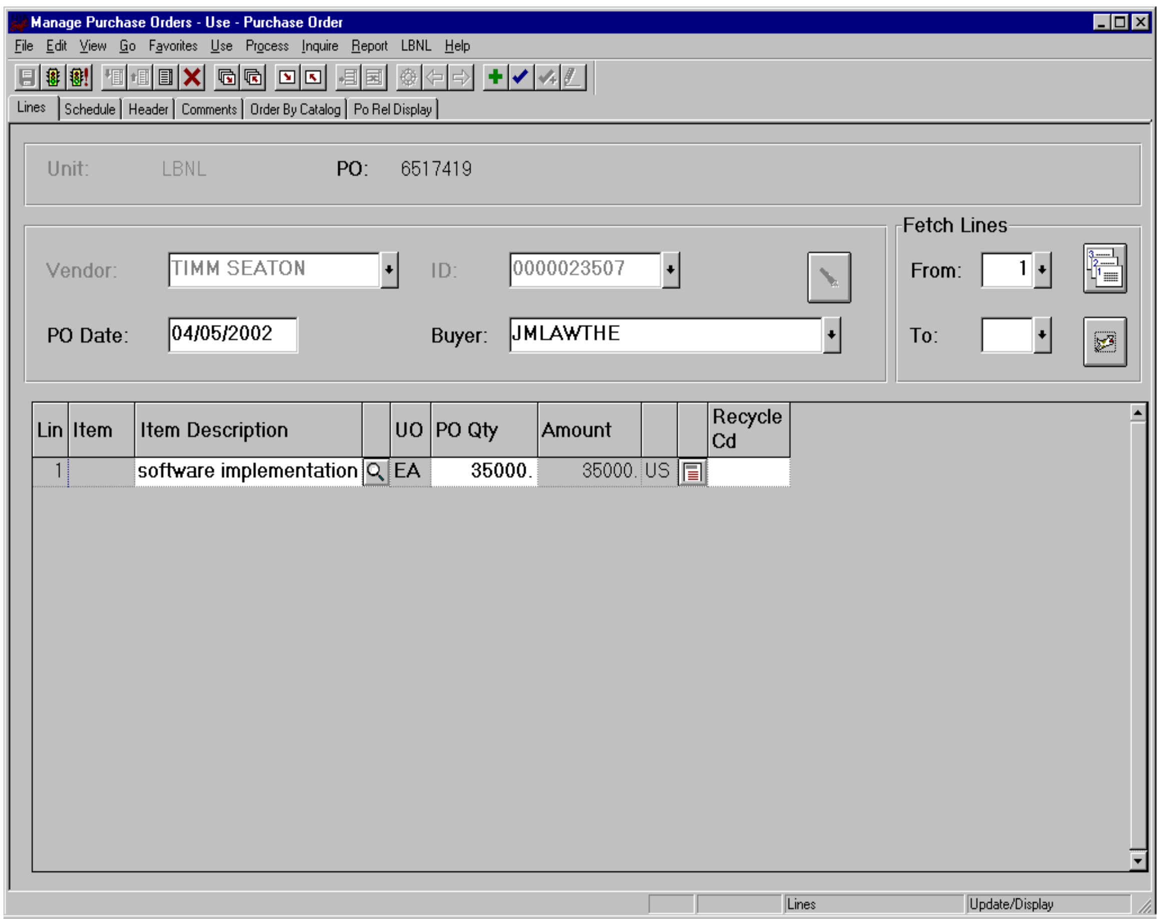
The business unit of LBNL will default.

Enter the Purchase Order number of the dispatched Purchase that requires the change in encumbrance..

Click **OK**.

The Update/Display Purchase Order Lines panel will display.

When the panel opens, click the Fetch  button. The Line Details will populate the panel.



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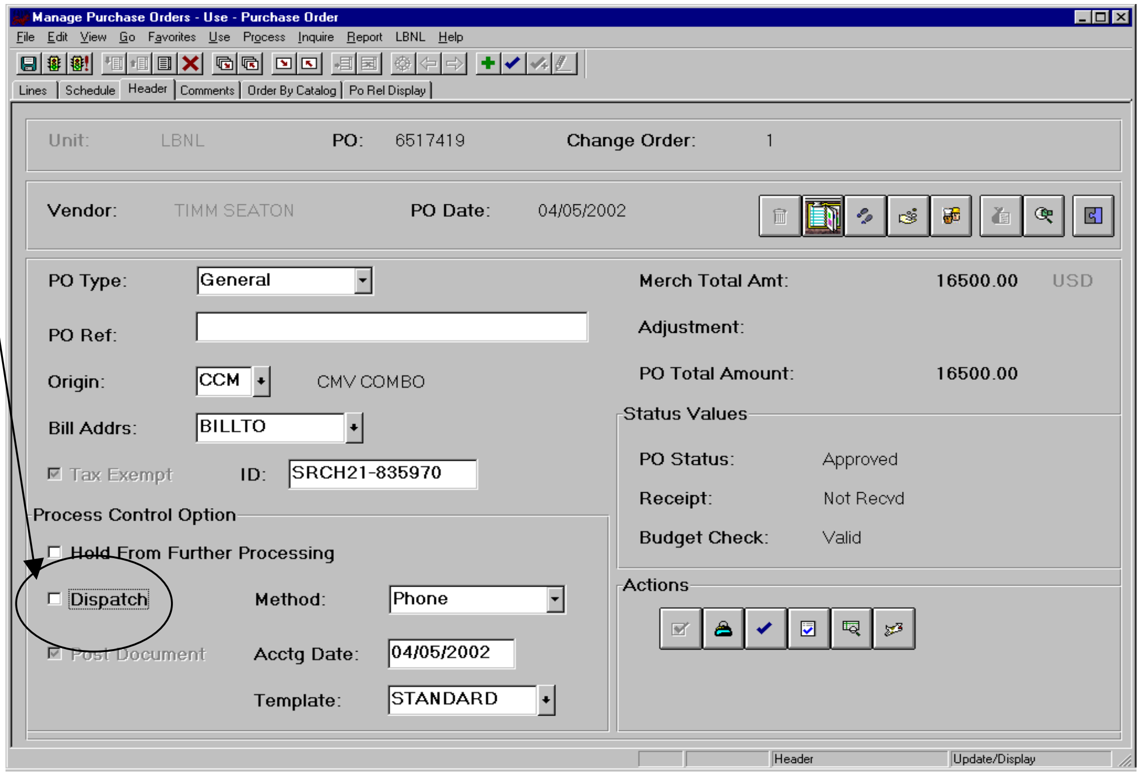
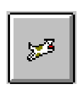
Proceed to the “Header panel and uncheck “Dispatch PO”.



Select the “Schedule Tab”, and click on the “Fetch  Button”

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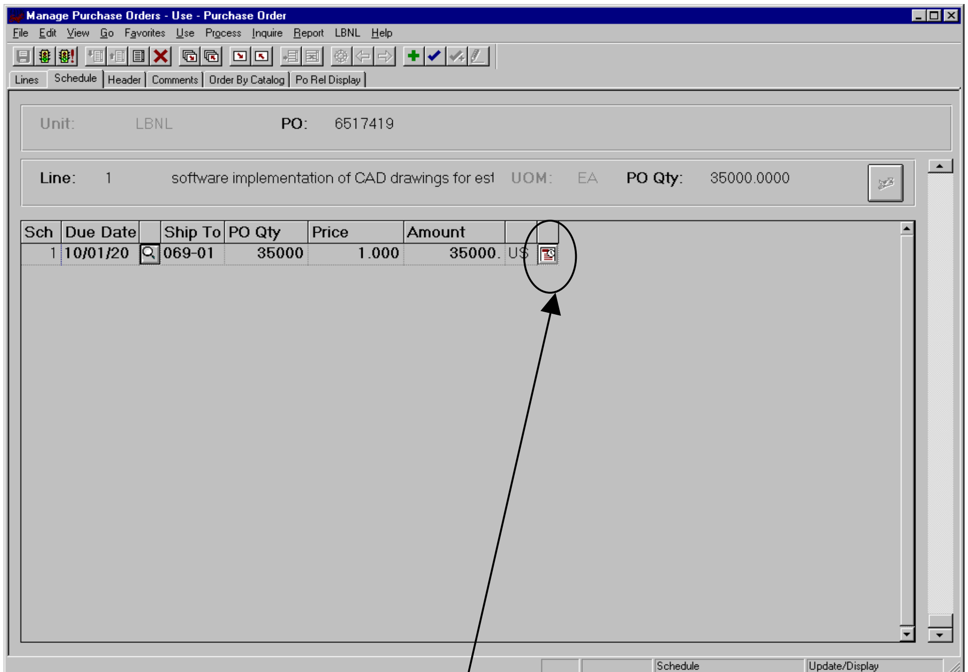
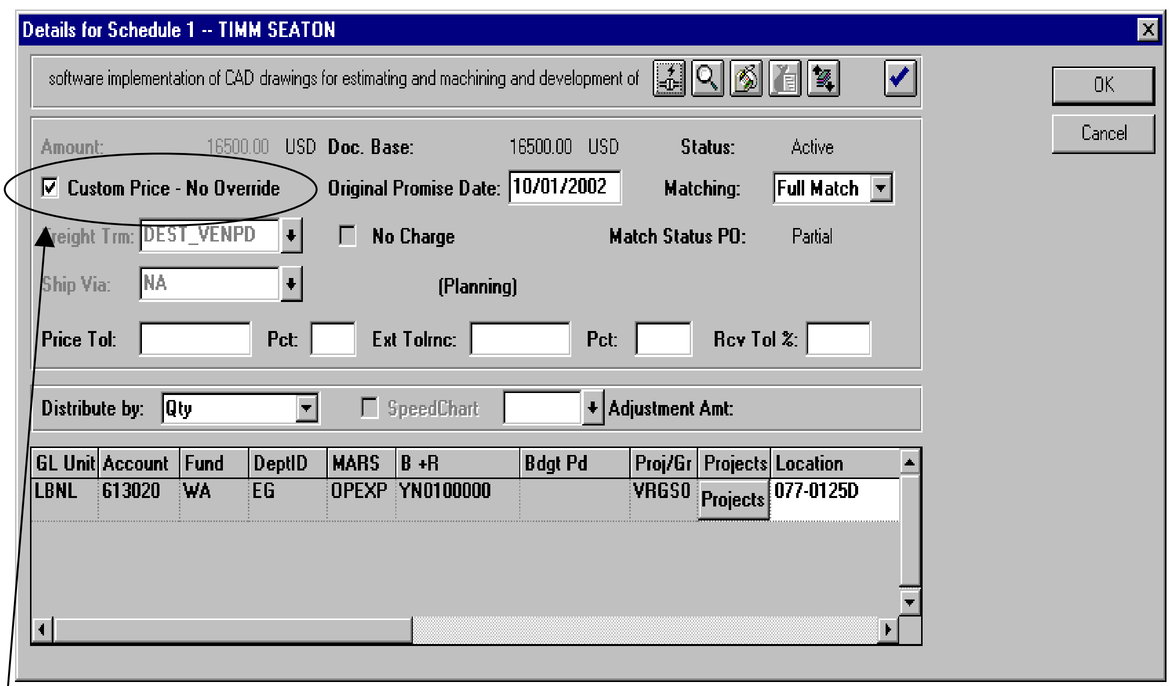


Click on the "**Schedule Details**" button.



Check the box next to **"Custom Price – No Override"**.

Click **OK**.

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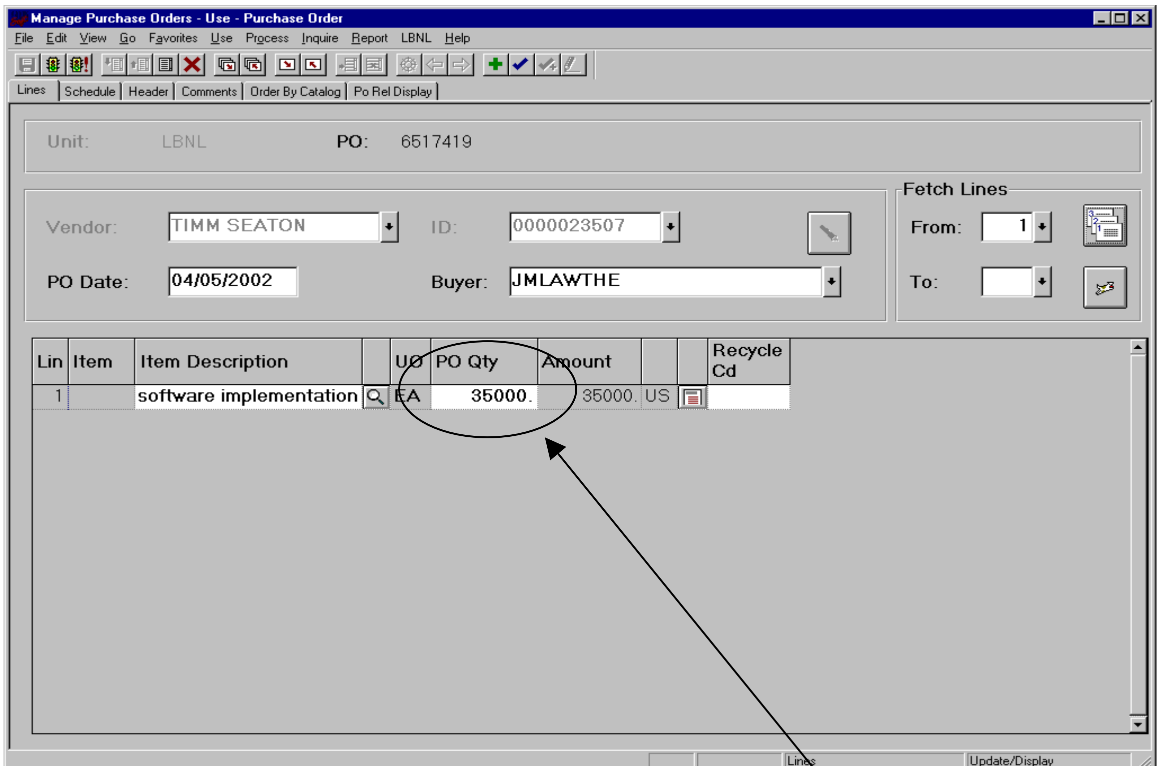
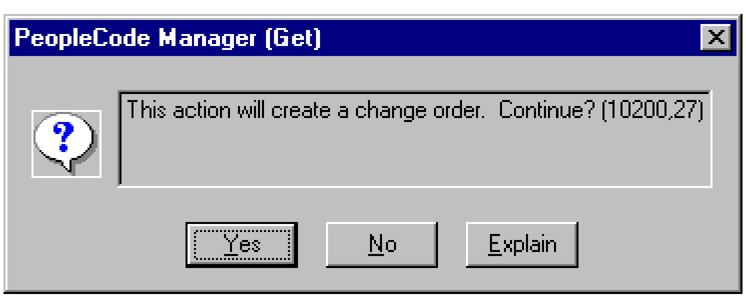
Step 2: Reducing the Line Amount

After you've complete the steps on the "Schedule Tab" click on the "Lines" tab to adjust the line qty.



Click into the PO Qty box and reduce the quantity to the desired amount.

Because this is a converted purchase order, you will be required to change the amount twice. After the first attempt you will be prompted with a message warning the user that this will create a "Change Order".



Click "**Yes**" to create the appropriate change order.

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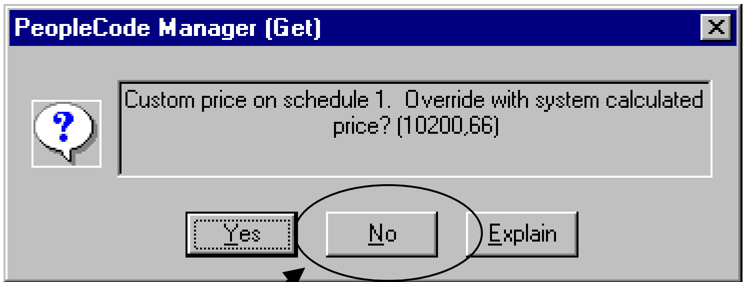
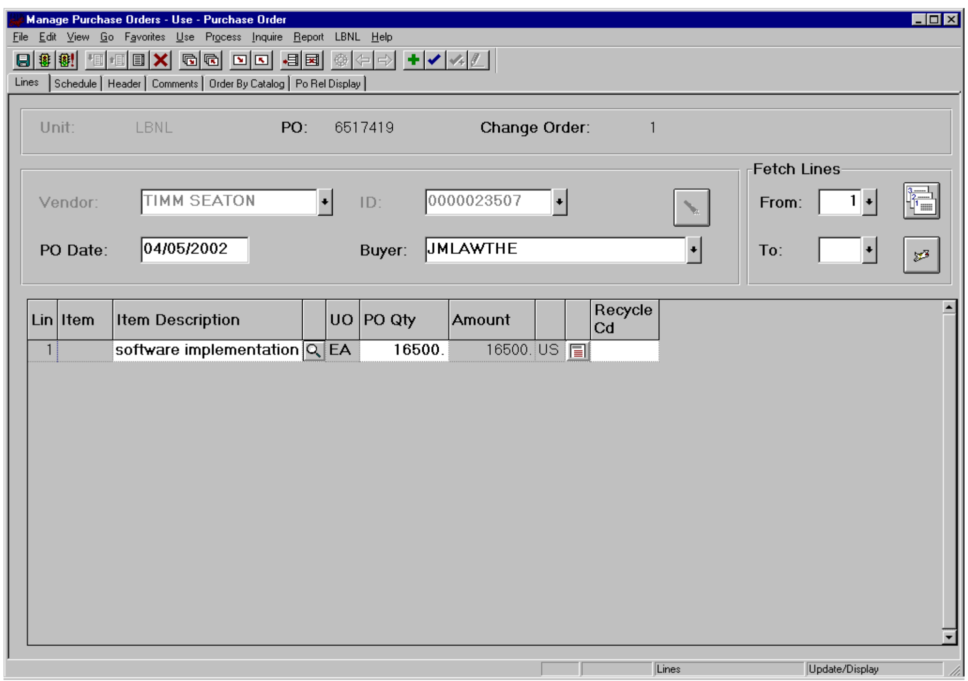
After clicking the yes button, change the amount to the correct amount. You will then be prompted by another message informing you on custom price changes and Override with system price.



On this warning panel click “**NO**”.

This will update your purchase order amount and will not recalculate based on the previous amount from the requisition.



You can confirm the change by clicking the schedules tab and verify of the quantity and that the previous price has remained the same. The total amount should’ve changed based on the new quantity amount.

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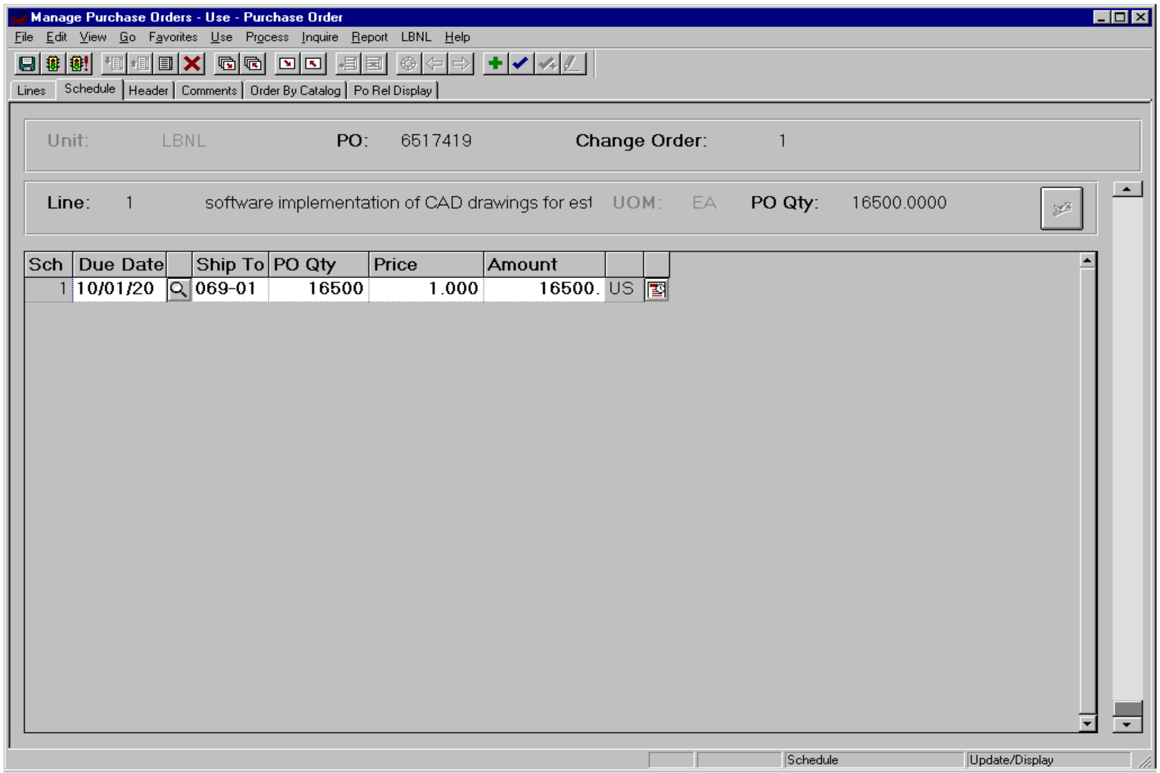

Once you've verified the amount is correct, go back into the header panel and recheck "Dispatch PO" and save the purchase order.

Go into the "Mod Table" make any necessary changes and record who requested the reduction.

Click **"SAVE".**

Once the process (Edits, Budget, Dispatch, & PO Post) are ran it will change the information on the PO Accounting lines.

NOTE: If this is a native PeopleSoft purchase order (i.e. 67XXXXX), the line information will return to the requisition selection pool to be resourced. These lines should immediately be sourced to an " I Am Trash" purchase order so they will not be mistakenly resourced onto another purchase order.